

## **STATE PROCUREMENT OFFICE**

### **Community Planning Process For Purchasing Health and Human Services During Fiscal Biennium 2003-2005**

#### **Purpose of Community Planning Process**

To practice uniform planning to maximize efficiency and economy in the procurement of health and human services; and to ensure that the state and service providers deliver services of the greatest need to the community. In addition, this planning process fosters sharing information between state agencies and the community about health and social welfare needs and best practices to deliver services. The intent of the planning process is to develop a seamless continuum of comprehensive, cost effective services purchased after ongoing planning has been completed by the state and the concerned community. Community planning will help to insure that the state will purchase services that are needed in the community from the most qualified service providers. Importantly, it further opens the planning and procurement processes. Fair decisions originate from an inclusive planning process and transparent procurement process.

#### **State Agency Planning Activities**

In order to make decisions on the type and amount of services to purchase, state agencies shall carry out planning activities, including but not limited to the following activities:

- (1) Obtaining information from funding sources, including the legislature, federal agencies, and private foundations on funding terms and conditions;
- (2) Obtaining information from other state agencies on services to the same community, families, children, adults, or school, or on cooperative strategies to make progress towards achieving a shared goal;
- (3) Considering the views of service recipients and community advocacy organizations on conditions affecting the achievement of mandated goals;
- (4) Considering the views of service providers on how to improve service specifications to better achieve mandated goals;
- (5) Analyzing information from program monitoring and evaluation reports for current contracts; and

- (6) Analyzing socio-economic and health data for trends, and analyzing waiting lists and client satisfaction surveys to determine demand factors.

### **Planning to Determine What Services to Purchase**

State agencies shall conduct information gathering and analysis with input from funding sources, other state agencies, client advocacy organizations and service providers on how to achieve better results in reaching goals established by statute, funding source, or through a community planning process.

State agencies shall also review the program monitoring and evaluation reports for current contracts.

### **Planning With Service Providers**

State agencies shall seek planning information from service providers. State agencies are encouraged to collaborate with service providers through sharing of planning information and analysis that results in improved service specifications for purchased services and progress towards desired outcomes.

To encourage provider participation, state agencies shall prepare requests for information to facilitate state agency planning activities. The request for information may be written, oral, issued through electronic media or any combination of these methods, and may be sent to any knowledgeable person or entity that the state agency deems advisable. A request for information may address any subject relevant to a state agency's planning activities and may include, but is not limited to the following:

- (1) Long- and short-term goals and objectives;
- (2) The target population or clients to be served;
- (3) The services the state agency anticipates may be necessary to achieve its goals and objectives;
- (4) Service specifications, requirements, feasibility, or cost;
- (5) Social and economic benefits; or
- (6) Benefits to the state and population to be served.

A request for information shall include, but is not limited to the following:

- (1) A description of the information being sought;
- (2) The procedure for responding;
- (3) A statement that service provider participation is optional, and is not required to respond to any subsequent procurement action a state agency may take;
- (4) A statement that neither the state agency nor the interested party responding has any obligation under the request for information; and
- (5) A statement that uncompensated service provider participation is encouraged, and such involvement shall not disqualify any responsible service provider from responding to any subsequent procurement actions a state agency may take.

### **Collaboration With Providers**

State agencies shall provide opportunities for service provider participation in state agency planning activities in order to create greater efficiency, responsiveness, and organization in meeting the health, social and economic needs of the various communities. Areas of collaboration with service providers shall include, but are not limited to the following:

- (1) Sharing of information on community needs;
- (2) Determination of best practices;
- (3) Inventory of available resources;
- (4) Determination of contracted services;
- (5) Budgetary, cost or funding factors;
- (6) Prioritization of services;
- (7) Design and configuration of services;
- (8) Recommendations for service specifications and requirements; and
- (9) Cost benefit structure.

## **Planning With Service Recipients and the Community**

State agencies may provide opportunities for service recipients, their families, and the community, as applicable, in state agency planning activities in order to create services that are most appropriate and responsive in meeting service recipient needs. The activities specified above may be utilized, as well as any others deemed appropriate, such as surveys.

*Please direct questions to:*

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